

CBO-ONE Supervisor Checklist

Supervisors – Complete and provide a copy of the checklist to the CBO-WFM Worklife Onboarding Team at the end of each checkpoint and keep the original for your use until the Onboarding process is completed. Submit checklists at each checkpoint to CBOWFMONboarding@va.gov. Please direct all Onboarding questions to the CBO-WFM Worklife Onboarding Team.



EMPLOYEE NAME: _____		
SUPERVISOR'S NAME: _____		
Prerequisites	Date Completed	Supervisor Initials
Complete required CBO-ONE Supervisor training module in TMS #3867589.		
Prior to contacting the new hire read the CBO-ONE Supervisor's and Sponsor's guide provided by CBO-WFM WL OB team by email.		
Schedule appointment with assigned Sponsor to discuss roles and responsibilities.		
Prior to New Hires Arrival	Date Completed	Supervisor Initials
Send welcome email and/or call week prior to arrival to welcome and arrange meeting.		
Confirm the new hire received the "Welcome Letter" from Staffing & Classification. Ensure the new hire knows their report date, report time, report location and who to contact in the event of an emergency or inclement weather.		
Assign a sponsor and notify the CBO-WFM Worklife Onboarding Team of the Sponsor Name. (Sponsor Name: _____)		
Assign and prepare workspace; provide standard office supply package.		
Ensure IT and communications essentials (e.g., computer, phone, e-mail, training accounts, network access, TMS account) are set up.		
Prepare staff for new employee's arrival, (e.g. provide biography, arrange meetings for first week).		
NOTE: A copy of the completed checkpoint for this section must be provided to the CBO Onboarding Team NLT 7 business days after new employees EOD.		
Day 1: First Day in the Office	Date Completed	Supervisor Initials
Introduce new employee to fellow team members.		
Provide information about the organization and its culture. Include the organizational chart, and go over everyday aspects about the job.		
Allow some time for the new employee to settle into the office; check in with them frequently.		
Follow up to ensure the required VA, CBO and internal agency policies/procedures were covered with the new employee in NEO and there are no questions or concerns.		
<ul style="list-style-type: none"> Workplace safety (include injury reporting, health clinic info, etc.). 		
<ul style="list-style-type: none"> Work policies (tour of duty, overtime, comp time, telework, schedules, inclement weather, use of equipment, etc.). 		
<ul style="list-style-type: none"> Building access for employee and visitors – PIV Card Process. 		
<ul style="list-style-type: none"> What's prohibited in the workplace (e.g., weapons, recording devices, etc.)? 		
<ul style="list-style-type: none"> Other (Ethics, FOIA, EAP, dress code, Wellness Services, Worklife programs, etc.). 		
At the end of the day, be sure to discuss the first-day experience with the new employee and answer questions.		
NOTE: A copy of the completed checkpoint for this section must be provided to the CBO Onboarding Team NLT 7 business days after the employees first 7 days.		
Week 1	Date Completed	Supervisor Initials
Ensure job roles and responsibilities are clearly communicated to new employee.		
Review training (https://www.tms.va.gov/learning/user/login.jsp) with new employee (include required training and how to request training).		
Review organizational structure and key staff (provide contact info).		

Help the new employee develop his/her network by introducing them to their internal strategic partners.		
At the end of the first week, be sure to discuss the first weeks experience with the new employee, provide feedback on his/her performance and answer questions.		
NOTE: A copy of the completed checkpoint for this section must be provided to the CBO Onboarding Team within 7 business days after the new employee completes their first week.		
First 30 Days	Date Completed	Supervisor Initials
Explain performance plan process, review performance expectations and issue Performance Plan (<i>Mandatory Requirement Day 30</i>)		
At the end of the first 30 days, be sure to discuss the employee's work experience to date, provide feedback on his/her performance, discuss how you can help them do their job better or more efficiently (more training, manuals, SOP's, etc.) and answer questions.		
REMINDER: Make coaching and mentoring resources available to help ensure a smooth and successful transition into the organization.		
REMINDER: Give performance feedback early and often, check in regularly to ensure the new employee has the required training, tools and resources needed to successfully perform their work.		
REMINDER: The purpose of the probationary/trial period is to provide the organization the opportunity to evaluate the new employee's conduct and performance on the job to determine if the appointment to the civil service should become final. The probationary/trial period is effective only if action is taken to address performance and/or conduct issues before the new employee's appointment becomes final		
NOTE: A copy of the completed checkpoint for this section must be provided to the CBO Onboarding Team within 7 business days after the new employee completes 30 days.		
First 90 Days	Date Completed	Supervisor Initials
Follow up with new employee to ensure all remaining benefits forms are completed and submitted to HR (60 days for health insurance, dental/vision)		
Explain and discuss purpose of an Individual Development (IDP) (i.e. IDP goals are your personal career and longer-term goals.) (<i>Recommended by Day 90</i>)		
Follow-up to ensure employee received 90-day Onboarding New Employee Survey		
REQUIRED: Upon completion of the new employees first 90 days of employment, you will be required to complete a Placement Follow-Up on VA Form 5-97 Notice of Pending Personnel Action. The placement follow-up will be used to evaluate the employee's progress and adjustment during the probationary/trial period. The form will be sent to you via email your local Customer Liaison. If you do not receive this form, please contact your local Customer Liaison for assistance.		
REMINDER: Make coaching and mentoring resources available to help ensure a smooth and successful transition into the organization.		
REMINDER: Give performance feedback early and often, check in regularly to ensure the new employee has the required training, tools and resources needed to successfully perform their work.		
NOTE: A copy of the completed checkpoint for this section must be provided to the CBO Onboarding Team within 7 business days after the new employee completes 90 days.		
First 6 Months	Date Completed	Supervisor Initials
Revisit performance standards with mid-year review and provide feedback on his/her performance. NOTE: New employees that start after March 31 will have an adjusted mid-year review timeframe based on their start date. EOD date:_____		
At the end of the 6-months, be sure to discuss the employee's work experience to date, discuss how you can help them do their job better or more efficiently (more training, manuals, SOP's, etc.) and answer questions.		
RECOMMENDED: Upon completion of the new employees first 6 months of employment, use VA Form 5-97 Notice of Pending Personnel Action to conduct a Placement Follow-Up. The placement follow-up is used to evaluate the employee's progress and adjustment during the probationary/trial period.		
Follow up to ensure employee received 6-month Onboarding New Employee Survey.		

REMINDER: Make coaching and mentoring resources available to help ensure a smooth and successful transition into the organization.		
REMINDER: Give performance feedback early and often, check in regularly to ensure the new employee has the required training, tools and resources needed to successfully perform their work.		
NOTE: A copy of the completed checkpoint for this section must be provided to the CBO Onboarding Team within 7 business days after the new employee completes 180 days.		
First 9 Months	Date Completed	Supervisor Initials
RECOMMENDED: Upon completion of the new employees first 9 months of employment, complete the VA Form 5-97 Notice of Pending Personnel Action and use your previously completed VA Form 5-97's to assess whether or not the new employee is on target to successfully complete the probationary/trial period. REMEMBER: The purpose of the probationary/trial period is to provide the organization the opportunity to evaluate the new employee's conduct and performance on the job to determine if the appointment to the civil service should become final. The probationary/trial period is effective only if action is taken to address performance and/or conduct issues before the new employee's appointment becomes final.		
NOTE: A copy of the completed checkpoint for this section must be provided to the CBO Onboarding Team within 7 business days after the new employee completes 270 days.		
First Year	Date Completed	Supervisor Initials
Complete employee's Performance Appraisal for the year. NOTE: New employees that start after March 31 will receive their performance review at the end of the fiscal year as long as they were on standards a minimum of 90 days or more on September 30. Employees with an EOD of less than 90 days from September 30, or that were not on standards for at least 90 days prior to September 30, will be evaluated at soon as they reach the minimum 90 day standards requirement.		
Set goals with the employee for the coming year.		
At the end of the 1 st year, be sure to discuss the employee's work experience to date, discuss how you can help them do their job better or more efficiently (more training, manuals, SOP's, etc.) and answer questions.		
Follow up to ensure employee received 1-year Onboarding New Employee Survey.		
NOTE: A copy of the completed checkpoint for this section must be provided to the CBO Onboarding Team within 7 business days after the new employee completes 365 days.		

I have been briefed on the above items. Employee Initials _____ Date _____